Exploring Licensed Child Care Capacity, Enrollment, and Waiting Lists in Georgia

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The Georgia Department of Early Care and Learning (DECAL) contracted with a team at the Urban Institute to conduct a study in 2024–25[1] that would help them better understand, estimate, and support licensed child care supply across Georgia. In this brief, we highlight insights from leaders of licensed child care learning centers (N = 808) and family child care learning homes (N = 284) who responded to our web-based survey in February through March 2025 (26 percent response rate), and insights from matching key survey responses to DECAL's publicly available administrative data from January 2025. We examined data on several dimensions including by centers and homes, for profit and nonprofit ownership types, single-site and multi-site centers, and urban and rural geographies. In all products we provide findings by centers and homes because of the differences in licensing requirements, size, and characteristics of these programs. We discuss other dimensions when doing so provides additional insights; for some analyses in this brief, we also discuss nonprofit and for-profit status of centers.*

KEY FINDINGS

- **Licensed child care capacity** for child care centers **overestimates both the number of child care slots providers wish to fill and the number of children they currently serve.**
- **Licensed child care capacity is fairly close to the number currently served in family child care homes.**
- **About half of providers have waiting lists**. For centers, the highest proportion of children waiting relative to children enrolled are infants and then school-agers.
- Many providers with waiting lists **also have unfilled slots**.

What Does Licensing Data Tell Us about Child Care Supply?

The administrative data tell us how many child care centers and homes have been licensed by the state to meet the child health and safety requirements, where they are located, the hours they are authorized to operate, the age ranges of the children authorized to attend, and the licensed child care capacity, which is the maximum number of children allowed to be on-site at any one time provided that sufficient staff are also on-site. Center and home operators may seek the maximum flexibility for hours, ages, and numbers of children when they apply for their child care license. They may prefer to serve fewer children than the maximum would allow, or they may routinely operate with fewer children than the maximum allowed due to other constraints.

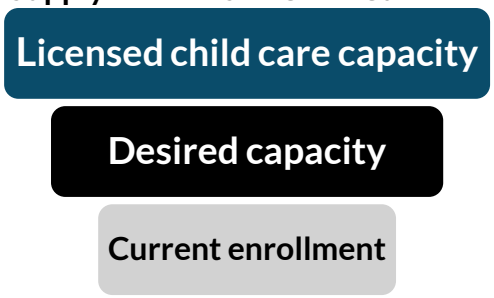
* Nonprofit and for-profit status was determined based on how respondents identified their facility's ownership status in the survey.

What Can Help Us Understand Actual Licensed Supply Better?

Child care programs need to enroll the right number of children to generate enough revenue to stay open and have the resources to provide care in accordance with licensing standards and additional standards they seek to meet. Programs may serve fewer children than they are licensed for, but not more at any one time.

FIGURE 1

Supply of Licensed Child Care



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Source: Author's graphical interpretation of enrollment.

When thinking about child care supply, it may be helpful to think of it as a funnel. Licensed child care capacity is the widest part of the funnel, as shown by the top blue bar in figure 1. Many child care programs, however, choose to serve fewer children (desired capacity), as shown by the middle black bar. ***The black bar, and not the blue bar, represents child care supply when providers are able to operate at desired capacity.*** We have the potential to overestimate supply when we use the blue bar. The current enrollment (bottom gray bar) of a particular child care program may be equal to or less than its desired capacity. When it is less, that means there are empty slots and the child care program would like to enroll more children; those empty slots are unused supply. When the current enrollment is equal to desired capacity, then all supply is being used. Sometimes child care programs have waiting lists, which are indicators that there is not enough supply to meet the needs of families and children in that community. Centers typically track waiting lists by child age.

How Full Are Licensed Child Care Providers in Georgia?

Over half of licensed centers (55 percent) and just over a third (36 percent) of licensed homes report that they are advertising to fill open slots. Licensed capacity differs between centers and homes. A center's licensed capacity depends on its size and other factors. All licensed homes have a maximum capacity of six children. Among homes, current enrollment is 94 percent of licensed capacity. Among centers, however, there are considerable differences among licensed capacity, desired capacity, and current enrollment. Desired capacity of centers is 71 percent of licensed capacity, and current enrollment is just 81 percent of desired capacity, and only 58 percent of licensed capacity (see table 1).

TABLE 1

Centers' Licensed and Desired Capacity, and Current Enrollment

Among the 473 centers in the matched sample, desired capacity was 71 percent of licensed capacity

Characteristics	Licensed capacity (slots)	Desired capacity (slots)	Current enrollment (children)
Licensed capacity (%)	100%	71%	58%
Desired capacity (%)	N/A	100%	81%
Mean	121	86	70
Median	108	74	56
Minimum	9	3	2
Maximum	581	373	373
Total slots of matched centers	**57,250**	**40,869**	**32,955**

Source: Urban Institute Georgia Child Care Needs and Services Survey, February through March 2025; DECAL Administrative Licensing Data, received January 30, 2025.

Notes: Data reflect weighted analyses. These data represent the current enrollment and desired enrollment of the survey respondent matched with their licensed capacity. Respondents were asked a series of questions about the ages of children they served, how many children in that age group they were currently serving (current enrollment), and how many more children they would like to be serving for each age group. Desired

enrollment was calculated by adding together the current enrollment and the additional desired amount. A total of 699 of 808 center-based respondents answered all the questions needed to appear in this table, and of those 473 could be matched with the administrative data and are therefore presented here.

How Many Child Care Providers Have Waiting Lists?

When a program has more demand than available slots, a provider may offer a waiting list. Families can put their child on the waiting list, and then the provider will contact them when they have availability for their child. A child can be on more than one waiting list, so the number of providers with waiting lists represents general demand for programs but not the exact number of children waiting. ***About half of providers have waiting lists, including 59 percent of centers and 43 percent of homes*** (see table 2)**.** Both nonprofit and for-profit centers have children waiting.

We found that 75 percent of centers with waiting lists have them for some age groups and not others, and 89 percent of centers with waiting lists report both vacancies and waiting lists for some of the same age groups. One reason a provider could have both vacancies and waiting lists for the same age group is that the vacancy could be for a child that meets a particular developmental milestone, such as the ability to eat solid food, and the children waiting have not yet reached that stage of development.[2] Another reason could be a staffing shortage; in other words, they may want to enroll more children but do not have sufficient numbers of child care educators hired to do so.

TABLE 2

More Than Half of Centers and Nearly Half of Homes Have Waiting Lists

Some have both waiting lists and vacant slots

Provider type	Sites with waiting lists (%)	Average # of children waiting	Sites advertising to fill vacant slots (%)
Licensed center	59%	35	55%
Licensed home	43%	7	36%

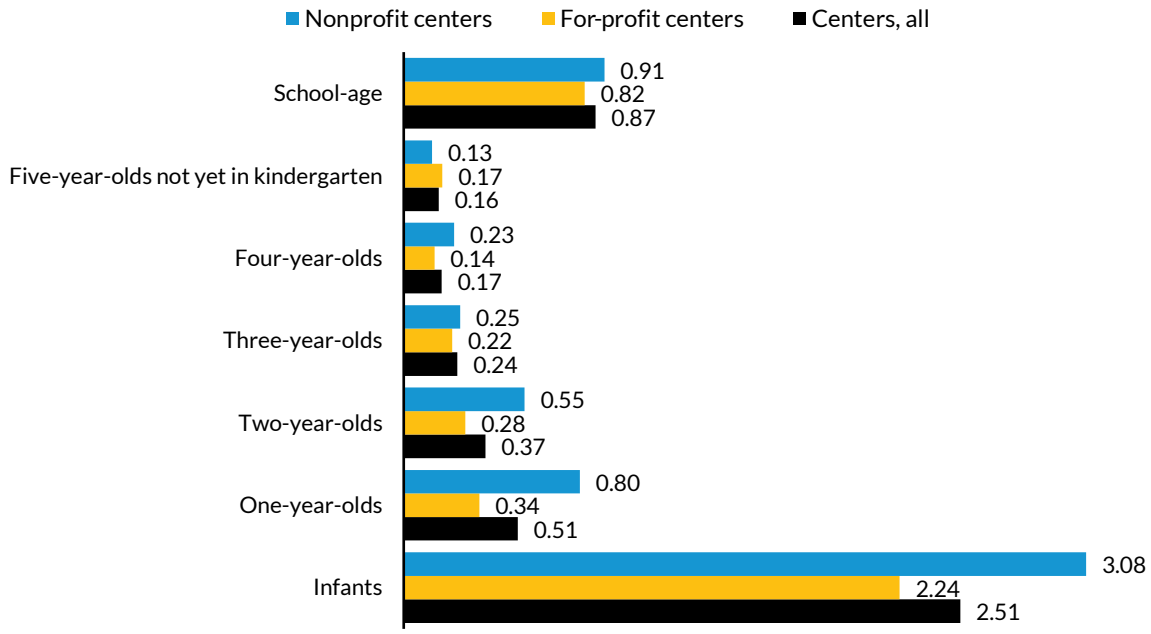
Source: Urban Institute Georgia Child Care Needs and Services Survey, February through March 2025.
Notes: Data reflect weighted analyses. This table represents the answers to three survey questions: "Does this child care center (family child care home) have a waiting list?" (N = 674 centers and 225 homes), "How many children are waiting to be served?" asked only of the respondents answered yes to having a waiting list (N = 336 centers and 93 homes), and "Is your center (home) currently advertising to fill empty child care spaces?" (N = 655 centers and 227 homes).

When comparing the number of children waiting by age with the number of children enrolled by age, we see that ***the largest shortfall is for infants, followed by school-age children*** (see figure 2). In the figure, a "1" means that there is one child waiting for every child enrolled at that age group. A number higher than 1 means that more children are waiting than are enrolled. For every infant enrolled, there are 2.5 infants on waiting lists, reflecting a high demand for infant slots. Looking strictly at numbers of children waiting, there are more school-age children waiting than for other age groups. The proportion of children waiting is similar for nonprofit and for-profit centers.

FIGURE 2

Size of Child Care Center Waiting Lists as a Proportion of Enrollment in Programs with Waiting Lists

The largest shortfall is for infants, followed by school-age children



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Source: Urban Institute Georgia Child Care Needs and Services Survey, February through March 2025.

Notes: A "1" means that there is one child waiting for every child enrolled at that age group. Data reflect weighted analyses. The figure represents author's calculations across multiple survey questions. For each age group, only centers who reported both waiting list and enrollment numbers are included in the figure; some centers reported a waiting list of zero. Centers that enroll: infants (N = 172); one-year-olds (N = 353); two-year-olds (N = 358); three-year-olds (N = 393); four-year-olds (N = 359); five-year-olds not yet in kindergarten (N = 189); and school-age children (N = 225).

Summary of Key Insights

One important dimension of understanding child care supply is determining how many child care slots are being offered (desired capacity), the extent to which children and families are using the slots offered (enrollment), knowing which proportion of slots are empty (vacancies), and how many children are waiting relative to enrollment. The insights in this brief suggest a complex balance, with some child care providers reporting both waiting lists and vacancies. This study reveals that there are fewer child care center slots offered than licensing data indicate, with about half of operators indicating they have waiting lists. While there are waiting lists for all ages, it appears that available options for infants and school-agers are most limited.

Notes

[1] Additional findings, data, and information about how we conducted this study and other work conducted in partnership with the Georgia Department of Early Care and Learning can be found at on our website, https://www.urban.org/projects/partnering-georgia-department-early-care-and-learning-strengthen-georgias-early-care.

[2] See Laura Wagner and Teresa Derrick-Mills. "Families that Georgia Child Care Providers Seek to Serve and What They Request" (Washington, DC: Urban Institute, 2026), https://www.urban.org/research/publication/understanding-licensed-child-care-supply-georgia.

About the Authors

Laura Wagner is a research associate with a focus on early childhood policy; she led the survey development, data collection, and analysis. Teresa Derrick-Mills is a senior fellow with a focus on child care systems; she led the study. Dow Drukker is a research analyst focusing on child welfare and child care; he led the administrative data and matching analyses. They are all in the Family and Financial Well-Being Division of the Urban Institute.

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